



DEPARTMENT OF HUMAN SERVICES
SENIORS & PEOPLE WITH DISABILITIES
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AUTHORIZED BY: _____

**SPD Assistant Director/
Deputy Assistant Director**

INFORMATION MEMORANDUM

SPD-IM-01-100

Date: December 10, 2001

TO: SPD District and Unit Managers
Area Agency on Aging Directors

SUBJECT: 2002 Training Calendar

INFORMATION: The attached calendar contains the primary offerings for eligibility workers and case managers whose jobs have elements of financial eligibility, service eligibility and/or protective services. Some computer system training is also offered. Course descriptions are also attached to this IM.

New this year is on-line registration for all of these trainings.
The website address for registering is:

http://dhstraining.hr.state.or.us:591/Training/Search_CourseList.htm

If you require assistance in using this new tool, please contact Amy Namitz.

Some of you may be receiving this calendar for the first time, so some explanation is in order. The order of the trainings and timeframes are important. The Basic training is aimed at new workers. It would be best to have at least a month in the branch to have some experience with the language/acronyms we use. Following Basic would be the Introduction course which is designed for workers who have taken Basic and have at least two months working on a caseload. General Assistance and Food Stamps are designed only for workers who have GA and/or FS caseloads, at least 4 months of experience on those caseloads and have taken the Introduction training. The Medicaid trainings are for workers who have gone through the previous four trainings and have at least 6 months on a caseload. The Intensives are

designed for on-going education for workers who have finished this series. It is best to give workers some breathing room to use the concepts/information from one training before going into the next.

Also, when they come back to the branch from a training they will need branch support to apply what they've learned.

CONTACTS: Amy Namitz for phone registration assistance
TELEPHONE: 503-378-8908 **E-MAIL:** Amy.R.Namitz@state.or.us
FAX: 503-378-5878

Dale Marande for calendar information
TELEPHONE: 503-945-6476 **E-MAIL:** Dale.F.Marande@state.or.us
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2002 SPD TRAINING CALENDAR*

Eligibility & Case Management Trainings		
Training	Dates	Location
Basic Worker Skills	January 29-31 March 26-28 May 7-9 June 11-13 July 30-Aug 1 September 10-12 October 29-31 December 3-5	Salem
Introduction to Eligibility	January 7-11 March 4-8 April 15-19 June 3-7 July 15-19 August 26-30 October 14-18 November 18-22	Salem
Food Stamps	February 12-14 April 23-25 June 25-27 August 13-15 October 22-24	Salem
General Assistance	Feb 26-28 May 21-23 July 9-11 October 8-10	Salem
OSIPM-EPD	January 23-24 April 3-4 July 2-3 August 21-22 October 2-3 November 6-7	Salem

Eligibility & Case Management Trainings

<u>Conferences</u>		
Eligibility/CM Intensives	March 20-21 September 25-26	Salem
Support Staff Conference	June 19-20	TBA
Adult Protective Services - Law Enforcement	Week of June 17	TBA
Medicaid Speciality - Eligibility	May 8 July 10 November 13 December 4	Salem
Medicaid Speciality - Services	May 9 July 11 November 14 December 5	Salem
Adult Protective Services-Facility	Feb 12-14 (Part 1) Feb 26-28 (Pt. 2) May 7-9 (Pt. 1) May 21-23 (Pt.2) Aug 13-15 (Pt. 1) Aug 27-29 (Pt. 2) Nov 5-7 (Pt.1) Nov 19-21 (Pt.2)	Salem Salem Medford Salem Salem Salem Salem Salem
Adult Protective Services - Community	March 11-15 June 10-14 September 16-20 Dec 9-13	Salem Salem Hood River Salem
New Employee Orientation	April 9 September 10	Salem

Computer Trainings		
Inquiry**	May 1-2	Salem
ACCESS - PM Following Basic Worker Training. Sign up for this separately from Basic. ACCESS holds 1 day trainings which they schedule. Call them at 503-378-2101 ext.224 to register or ext.335 for training information.	January 31 March 28 May 9 June 13 August 1 September 12 October 31 December 5	Salem
CBC 512	March 13-14 June 5-6 August 7-8	Salem
CA/PS	February 20-21 May 1-2 July 31-August 1 October 23-24	Salem

* Not all inclusive for SPD

**Local Staff Provide Most of Inquiry Trainings

COURSE DESCRIPTIONS

(Please see Calendar or IM for times and locations)

ELIGIBILITY FOCUS

BASIC WORKER SKILLS

Expectations: Registrants will have experienced a basic overview of CHS/SPD, the branch's clients and work flow. They will have entered, assisted or observed another worker in entering a CMS and/or FS case into ACCESS and the mainframe.

Skills Needed: basic keyboard skills

Time frame: 2½ days

Overview of Agency

- field & central office structure/mission statement & philosophy, SS Act,

Overview of Programs, concepts of programs/eligibility/etc.

- acronyms/waivered services basics

In-depth training on: WEBM,FIND/Internet Manuals/Help Windows

INTRODUCTION TO ELIGIBILITY/BUDGETING/SERVICES

Expectations: Registrants will have worked with their SPD/CAF Internet Resources as part of Eligibility Decision and/or Case Planning.

Skills Needed: Use of Internet Resources; Help Windows;

Time frame: 4 days

Basic nonfinancial and financial eligibility for all programs/location of relevant program material in rules/manual

Overview of CMS data-entry

GENERAL ASSISTANCE

Expectations: Registrants will understand basic Medicaid eligibility and the eligibility determination process. They will also be expected to be currently responsible for a GA caseload and have a need for more in-depth understanding of specific areas of policy.

Skills Needed: WEBM,FIND; Use of Internet Program/Rules Manuals; Help Windows;

Time frame: 2.5 days

Impairment listings/collecting medical evidence/Admin. exams/disability decisions/cooperation/effective dates/calculations

FOOD STAMPS

Expectations: Registrants will understand basic Food Stamp eligibility and the eligibility determination process. They will also be expected to be currently responsible for a FS caseload and have a need for more in-depth understanding of specific areas of policy.

Skills Needed: WEBM, FIND; On-line Manuals; Help Windows;

Time frame: 3 days

Filing date/expedited services/separate households/medical deductions/shelter and utility standard/categorical eligibility/OFSET/ABAWD/motor vehicles/FSMIS

MEDICAID SPECIALITY - ELIGIBILITY

Expectation: Registrants will understand basic eligibility and the basic determination process. It is recommended that participants have attended the Introduction to Eligibility module.

Skills Needed: Basic eligibility worker skills; Use of Internet Program/Rules Manual

Time Frame: 1 day

Medically Needy Program; QMB Program, Protected Eligibility, Accessing Medical Care

EMPLOYED PERSONS WITH DISABILITIES

Expectations: Registrants will understand basic Medicaid eligibility and the eligibility determination process. They will be expected to be currently responsible for EPD cases and have a need for more in-depth understanding of specific areas of policy.

Skills needed: WEBM FIND, Use of Internet Program/Rules Manual, Help Windows, ACCESS

Time Frame: 1 day

Disability/adjusted income calculation /EIE/ approved account/ client contribution/premium/CMS coding/ACCESS

CASE MANAGEMENT/SERVICE FOCUS

MEDICAID SPECIALITY - SERVICES

Expectation: Registrants will understand basic eligibility and the basic determination process. It is recommended that participants have attended the introduction to eligibility module.

Skills Needed: Basic eligibility worker skills; Use of Internet Program/Rules Manual

Time Frame: 1 day

Waivered services overview, including calculating client liability; trusts; resource assessments.

ADULT PROTECTIVE SERVICES - FACILITY

Expectations: Registrants will assume responsibility for conducting protective service investigations in facility settings, including nursing facilities, adult foster care, residential care, assisted living, and room and board. Priority will be given to new investigators. Registrants will have received, and will bring to the training, the SDSD Adult Protective Services Manual, Volume I: Facility Investigations. Registrants will be expected to complete both Part One and Part Two of the same training session.

Skills needed: Basic interviewing and report writing, general knowledge of facility operating requirements.

Time frame: two 3-day sessions

Overview of facility protective services: theory and philosophy; overview of types of abuse; legal authority; screening and intake; referrals; conducting the investigation; writing the report; interventions; and legal issues. Participants will conduct a mock investigation and write and critique reports.

ADULT PROTECTIVE SERVICES - COMMUNITY

Expectations: Registrants will assume responsibility for conducting protective service investigations in the community (non-facility) setting. Priority will be given to new investigators. Registrants will have received, and will bring to the training, the SDSD Adult Protective Services Manual, Volume II: Community Investigations.

Skills needed: Basic interviewing and intervention skills, basic knowledge of community resources.

Time frame: 4 days

Overview of community protective services; legal authority; basic intervention and investigation skills; specific types of abuse; special issues; collaborations; legal interventions and entry of community protective service reports on the ACCESS system.

CONFERENCES

ELIGIBILITY/CM INTENSIVES

Expectation: Registrants will be able to determine eligibility for either service or non-service cases prior to the intensives.

Skills Needed: Basic eligibility worker and/or case manager skills

Time frame: 2 days each conference

The intensive conferences are intended as continuing education for case managers and financial workers who have been through the training modules and are wanting more in-depth information on specific topics. The sessions offered are based upon requests and suggestions from field staff and managers. **

SUPPORT STAFF CONFERENCE

Time frame: 2 days

The support staff conference is intended for **ALL** support staff. Typical conference sessions include: “best practices”, increasing customer service skills, gaining a greater understanding of the customers we serve, and a review of SDS/AAA policy and procedures. Sessions are tailored to meet the needs of our support staff. **

**Please contact Lauren Mitchell with session suggestions for any of the above conferences. Lauren can be reached at 503-945-6479, lauren.e.mitchell@state.or.us or by GroupWise.

ADULT PROTECTIVE SERVICES/LAW ENFORCEMENT CONFERENCE

Time frame: 3 days

This year's conference is designed for APS staff and law enforcement personnel, enhancing knowledge and skills in investigating and prosecuting financial exploitation crimes against elders and people with disabilities.

COMPUTER TRAININGS

Inquiry

Expectations: Registrants will have looked up information on clients/applicants

Skills Needed: basic keyboard skills

Time frame: 1.5 days

An overview of approximately 50 screens used to inquire into every aspect of a case. Appropriate for screeners. Local field trainers and TEAs will be offering most of these training sessions. Central Office trainers will be offering sessions to field staff who don't have access to the above training resources.

CBC 512

Expectations: Registrants will have experience working with the 512 system, including entering a 512 on-line

Skills Needed: basic keyboard and 360 system skills

Time frame: 2 days

Includes: payment process screens; utility screens and the Cookbook.